EXECUTIVE SUMMARY

Study Overview

In 2005 the Washington State legislature initiated the Long-Term Air Transportation Study (LATS). The study began in response to the growing recognition that Washington's network of 140 public use airports needs to be managed as an integrated system, to more strategically invest the public resources necessary to preserve future aviation capacity.

Through LATS the legislature required the Washington State Department of Transportation (WSDOT) Aviation Division to assess existing capacity and implement a state aviation plan to determine long-term air transportation needs.

LATS is being developed in three phases, with this report representing the first phase of the effort. Each phase answers one of the three basic questions fundamental to the development of a systemwide approach to managing Washington's aviation resource:

- **Phase I – What do we have?** – This phase inventories statewide airport facilities and capacity and provides an assessment of existing conditions.

- **Phase II – What do we need?** – Phase II will provide a market forecast of statewide airport capacity and facilities. It will also include an analysis of air cargo and integrate the findings of Washington's high-speed passenger rail study.

- **Phase III –How will we get there?** – During this policy development phase, the Governor's Airport Planning Council will consider the LATS findings and public input to make recommendations on how to best meet the state's long term commercial and general aviation needs.

What is Included in the Phase I Report?

This document presents the findings of Phase I of this effort. It provides a snapshot of current airport facilities in Washington State, summarizing statewide airport facilities and services information and measuring current airport system capacity. This phase addresses existing conditions only. The results and data collection from Phase I will be used in Phase II as part of the forecasting analysis.

Work on Phase I spanned a timeframe of four and a half months and included a statewide airport inventory survey. The airport inventory survey updated WSDOT's 2003 system plan effort, and expanded the information gathering significantly. In addition to including the commercial service airports, the survey included a number of new elements to provide a comprehensive overview of the physical inventory of the airport system. In addition to the survey, master plans were checked and phone calls made to gather data for the airport facility and capacity assessment.

The report provides an overview of LATS, explains the methodology used to assess airports, introduces the state classification system, presents the assessment results, summarizes the key findings, and outlines next steps.

How Was Capacity Assessed?

The airport capacity analysis estimated the total capacity at each airport based upon existing facilities and infrastructure including runways, taxiways, terminals, aprons, and aircraft parking. Current capacity utilization was also measured based on a number of key industry metrics such as total activity levels, operations, passengers, based aircraft, cargo volumes/tons and, where feasible, undeveloped land. The methodology used recommended FAA guidelines for measuring airport capacity.

Airport capacity was assessed for each individual airport level, by four Special Emphasis Regions that have experienced high population and aviation growth in the state, by regional transportation organizations and statewide. Additionally, the airports were grouped according to both the FAA National Plan of Integrated Airports System (NPIAS) classification and the newly proposed state classifications. The state classifications were recently developed and proposed within the last year and WSDOT plans to refine and finalize these classifications during the course of LATS.

In addition to providing a profile of Washington State airports, the airport capacity assessment establishes a baseline of the current system capacity levels and activity. This measure of baseline activity within an airport system is an essential tool used to identify existing and evolving roles, understand how airports serve their respective markets, assess overall capacity distribution, highlight deficiencies within the system and evaluate other characteristics that profile the overall airport system. These data become the basis for future development and investment decisions.

In the Phase I assessment, airports were classified in accordance with a newly developed state classification system. A baseline of various

proposed performance criteria was compared against each airport class to evaluate existing conditions. Among the state airport classifications, each considers slightly different performance criteria as appropriate to each respective airport group.

Summary of Key Findings

The major findings of the airport capacity assessment are detailed in Chapter 4 of the Phase I Report. Listed below are some of the major capacity findings:

Passenger Capacity

- With respect to passenger terminals at peak hour, only Seattle-Tacoma International Airport (Sea-Tac) and Tri Cities have been found to exceed the 60 percent threshold for utilization that the FAA identifies as the point that an airport should begin planning for new facilities.

- Due to increases in daily service by larger jets (130-150 seat MD83/87's) at Bellingham in early 2006, this airport facility has also begun to experience peak hour capacity constraints not reflective as dramatically in the 2005 airport inventory survey data.

Cargo Capacity

- Cargo capacity at Washington State airports is highly underutilized with the exception of Sea-Tac and Boeing Field/King County International, experiencing utilization levels of 80 percent and 60 percent respectively.

Reserve Capacity

- The busiest airports in Washington with the least reserve capacity total six and include three commercial service, (Boeing Field, Kenmore Air Harbor and Sea-Tac) two regional (Auburn and Harvey), and one seaplane base (Kenmore Air Harbor SPB) facility.

General Aviation Parking and Storage

- General aviation aircraft parking and hangar storage for all Washington airports has reached 85 percent of existing capacity statewide. However, several airports are close to reaching their maximum utilization levels.

- Hangars are more desirable than aircraft tie downs for storage. In many instances, tie downs are available but hangar wait lists have become prevalent across the state. Approximately 650 individuals are waiting for an aircraft hangar facility.

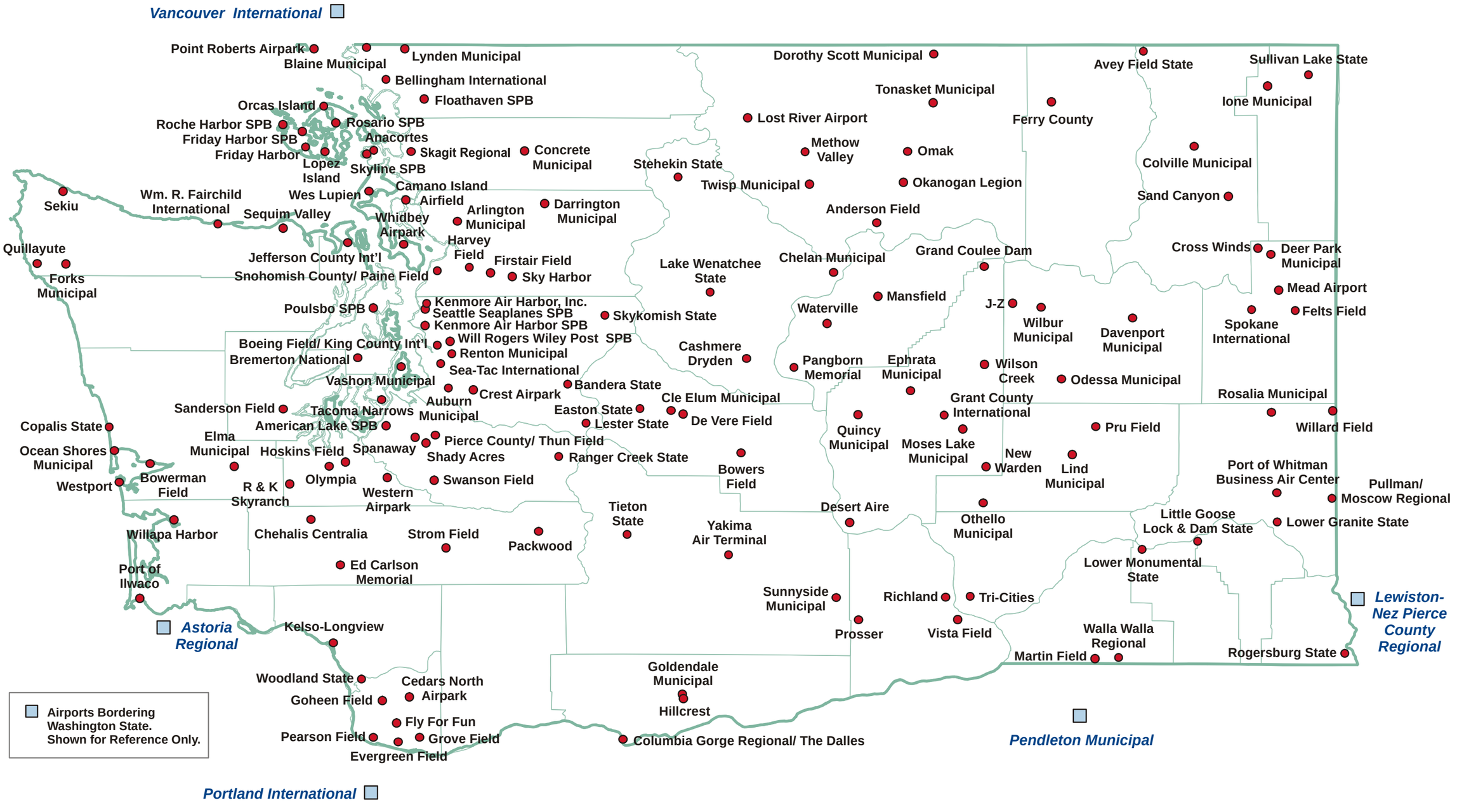
Undeveloped Land Inventory

- Airports with the largest amount of undeveloped land include: Bremerton National, Arlington, Spokane International, Deer Park, and Richland airports. It is important to note that a total 82 airports did not provide any data in the undeveloped land inventory survey, therefore, the reported acreage available for future development could be more than currently stated in the study.

Next Steps

Several of the Phase II work elements have begun during Phase I and will continue over the next ten months. The analysis will help identify which airports will meet, exceed or fall short of adequately serving the anticipated future demand. The findings of Phase II will summarize the estimated future capacity and projected market demand as well as preliminary systems alternatives, which will be incorporated into a technical report for presentation to the Governor's Airport Planning Council. Phase III will determine final recommendations of future airport development in Washington.

Washington State Public Use Airports



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